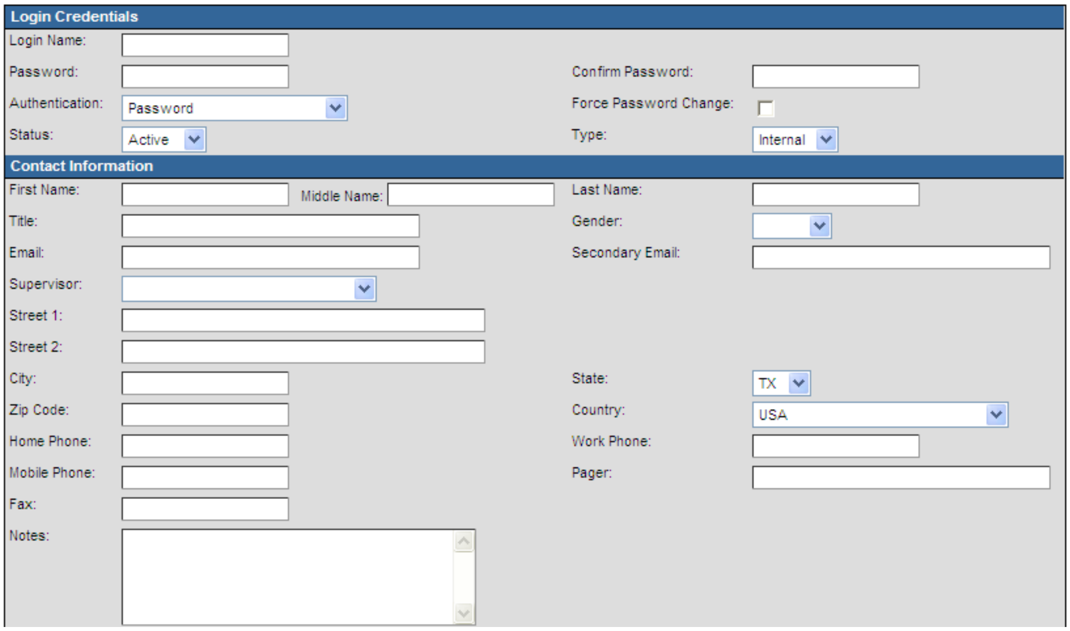
To perform Account Management tasks:

1. Enter the same Login Name and Password provided for reporting records
2. Change the Application drop-down menu selection from “Main” to “Administration”
3. Go to User Administration Tab

   Towards bottom of screen click on “Add User”

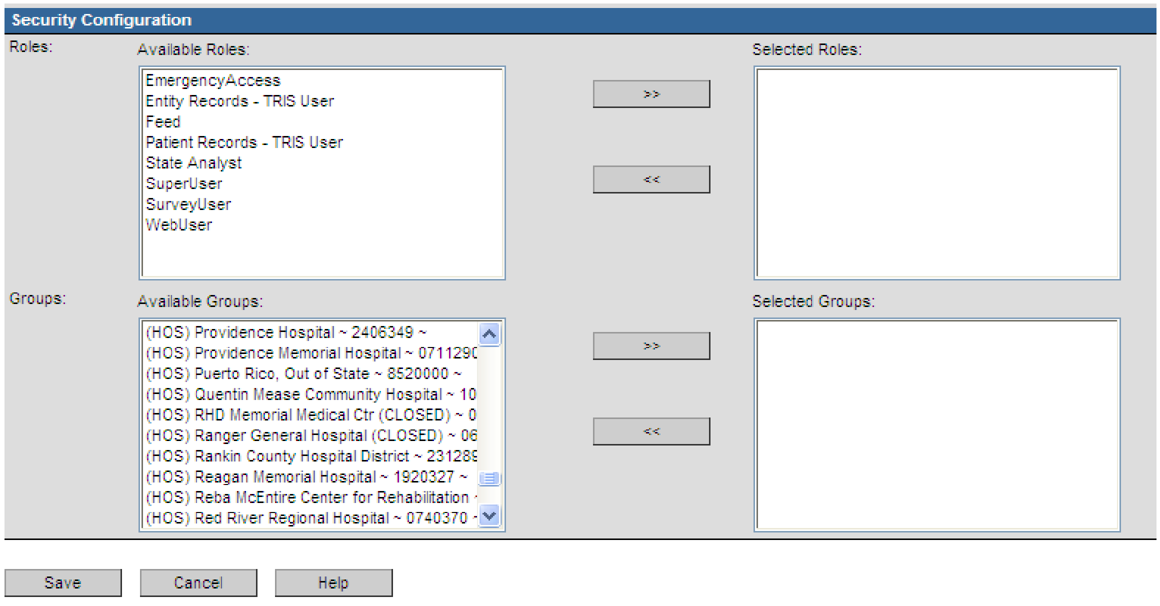


4. Fill in Log In Credentials:

   Login name: first two initials of the first name and all of last name
   All lowercase

   Password: 8-14 characters in length, one number and one symbol
   (e.g. *,&,#, $, etc.) and one character that is uppercase
   * Check the box to “Force Password Change” which means the first time the new user logs into the system, they will be asked to change their password.
   * Please make sure every password you create for a new user is ‘unique’, please do not use the same password over and over each time you add a new user.

Fill in contact information: use the person’s <u>work</u> email address. All email addresses should contain the first and last name of the person.

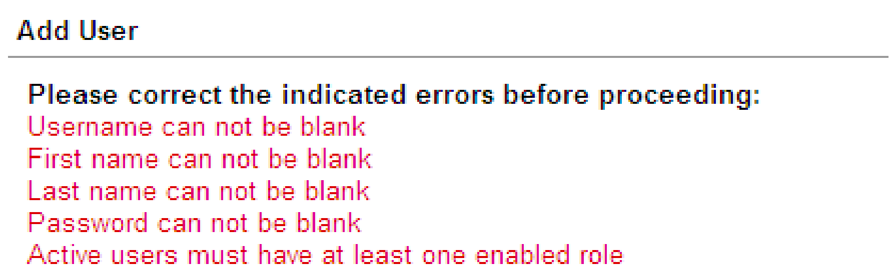


5. Select Roles and Groups:

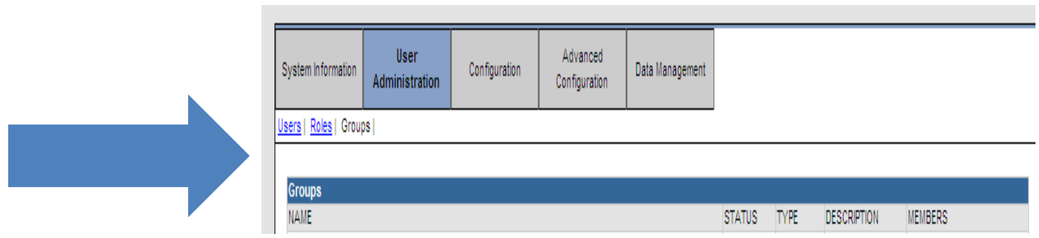
Roles:

Each new user will be assigned two roles:
Entity Records –TRIS User
Patient Records – TRIS User

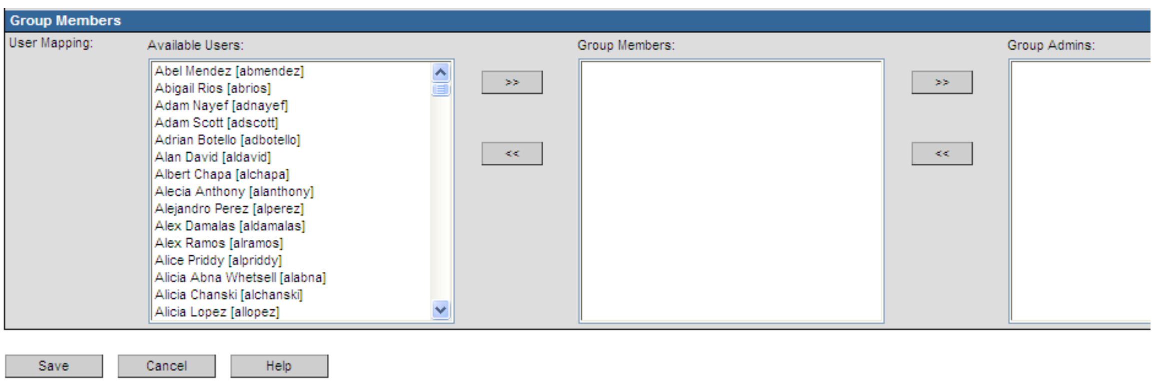
Click on the SAVE button.



6. Look at top of screen to see if there are any errors:
Correct errors and SAVE again.



7. Go to Tab for User Administration
   Select Groups by clicking on the hyper link (right under large tabs are small hyper links called Users, Roles and Groups)
   Click the name of the Group you are adding the user to
   Click on the EDIT GROUP button below the Group table.



8. Scroll down past the Group Definition section and go to the Group Members Section.
   Choose the user you created from the list by clicking on their name.
   Click on the arrow button that moves their name into the “Group Members” box.
   Click on Save to add the user to your Group.

   If you are creating an account manager, then after you click on the button that places them into the Group Members box, then click on the next arrow to put their name into the Group Admins box.
   Click Save.

   The new user may now login to the system.